

ITEMIZED DEDUCTIONS SCHEDULE A WORKSHEET

Tax Year _____

MEDICAL EXPENSES

Prescriptions	
Health Insurance	
Glasses / Contacts	
Hearing Aids/Batteries/Orthopedic Eq.	
Labs / X-rays	
Dentists	
Doctors	
Other Medical:	
Miles driven or transportation costs	
Long-Term Ins. (Special Rules Apply)	
Less: Insurance Reimbursements	

TAXES PAID

Real Estate Taxes--(Principal Residence)	
Other Real Estate Taxes:	
State and Local Income Taxes - Paid during the year for prior year	
Sales Tax Paid	
Foreign Taxes	
Auto License Tax	
Other _____	

INTEREST PAID

Institution	Amount
Mortgage Interest	
Mortgage Interest	
Mortgage Interest	
Home Equity Loan	
Mortgage Paid to Individual	
Amount	
Name	
Address	
Tax ID / Soc Sec#	
Investment Interest – Margin Interest	

CASUALTY / THEFT LOSSES

Must exceed 10% of your adjusted gross income	
Date of event	
Description of event	
Bring list of lost articles and value	

Questions or other information

CHARITABLE CONTRIBUTIONS

House of Worship	
Miscellaneous Cash	
Payroll Contributions	
Volunteer Out-of-pocket expenses	
Volunteer Auto Mileage	
Other Transportation Costs	
List below donations over \$250 given at one time	
Non-Cash Contributions (Under \$500)	
Non-Cash Contributions totaling over \$500:	
Bring receipts or list: Description, Date/Gift, Date/Purchase Original Cost, Value of Gift, How value was determined	

Miscellaneous Deduction Notes: 3 types of expenses

1. Unreimbursed Employee Business Expenses
2. Job Seeking Expenses
3. Education to Maintain & Improve your skills

Out-of-town overnight travel – We need itinerary,
Cost of lodging, flights, local transportation, phone, gratuities

Independent Contractors (1099)– list business income and expenses including auto on Schedule C worksheet not below

OTHER DEDUCTIONS:

Tax Preparation	
Safety Deposit Box	
Employee Business Expenses List Below-	
Union Dues	
Small Tools & Supplies	
Job Seeking Expenses	
Uniforms/Safety Equipment & Upkeep	
Publications / Subscriptions	
Research Materials	
Business Telephone	
Investment expenses (subject to limits)	
Gambling Losses(Limited to winning total)	

AUTO used by employees:

Purchase Date	
Make & Model	
Total Mileage for Year	
Miles Used For Business	
Parking and Tolls on Business	
Long Method – Make list all expenses paid for car during the year. Also, original cost of vehicle.	